

# Project Workload Analysis and Resource Leveling-LRD

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## Scope

This process defines the means by which Project Managers (PM) **Note: don't accomplish Resource planning in this process as Actors Response: PM added as an actor**, Resource Providers, Corporate Board, accomplish resource planning for the current fiscal year (CFY). All **except Response: Sentence reworded** the RMB will also use this process for the budget year (BY) and the year beyond the budget year (BY+1). For BY and BY+1, the RMB will use *Command Workload Analysis & Resource Leveling[PROC1024]*.

Projections of an organization's BY and BY+1 activities will be estimated based on best available information which may not be fully developed. Nevertheless, even a rough estimate based on PMPs, or other written documents will be worthwhile in anticipating workload in the outyears and therefore useful in the analysis. **Note: Does this only deal with In-House resources? If so needs to be better defined. Response: Note added to clarify**

## Policy

*Consolidated Command Guidance*[<http://www.usace.army.mil/inet/functions/rm/regs/regs.htm>]

*ER 5-1-11*[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>]

*ER 37-1-26*[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf>]

## Responsibility

**Note: Rollie may advise. Response: AcceptedRearrange per steps. Response: Reworded**

The Corporate Board and/or Project Review Board is responsible for deciding all unresolved resource conflicts between the PM and Resource Providers.

**Response: Accepted**Resource Providers are responsible for extracting data from P2 to analyze **Response: Accepted**scope, methods of accomplishment, cost **and Response: Accepted**distribution for activities identified by project delivery teams in CFY, BY, and BY+1. They are also responsible for ensuring adequate resources are available to meet the mission requirements and assigning roles to individual resources.

The Regional Management Board (RMB) is responsible for resolving CFY resource conflicts referred by Corporate Boards. In addition, under *Command Workload Analysis & Resource Leveling[PROC1024]*, the RMB is responsible for developing strategic plans regarding personnel acquisition or dismissal, contract type and quantity, development of regional centers of expertise, etc, in order to posture the Regional Business Center for the most efficient and effective future mission performance.

## Distribution

Business Management Office (BMO)\*

Corporate Board\*

Project Review Board Response: **Accepted**

Major Subordinate Command (MSC) Commander\*

Project Delivery Team (PDT)

Regional Management Board (RMB)\*

Resource Provider(s)\*

## Ownership

The BP/P2 Program Office is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

## System References

*Acronyms and Glossary[REF1001]*

*CEFMS Cost of Doing Business*

*Cookbook[http://www.usace.army.mil/inet/functions/rm/rmpg/revcook.pdf]*

*Change Management[PROC1004]*

*Command Workload Analysis & Resource Leveling[PROC1024]*

*PMP Development[PROC1012]*

*Resource Estimate Development[PROC1003]*

*Resource Forecast Analysis Annual Schedule[REF1009]*

*Standard and Recommended Computations for Workload Analysis and Resource Leveling[REF1008]*

*Team Establishment[PROC1008]*

*Work Acceptance[PROC1016]*

## Activity Preface

This process is performed whenever workload and resource availability are being analyzed. This can occur when evaluating whether work should be accepted (see *Work Acceptance[PROC1016]*), or the impact of changes to existing projects/programs (see *Change Management[PROC1004]*).

When this process is complete, return to the calling process: *Work Acceptance[PROC1016]*, *PMP Development [PROC1012]*, or *Team Establishment[PROC1008]*.

### Resource Provider(s)

1. Obtain district workload analysis report from P2.

**Reponse: Accepted**

2. Evaluate how the organization can provide resources necessary to execute the requested products and services.

Priority **order** for resource assignment shall be **district in-house, regional in-house resources**, outsourcing percentage goals and customer preference. **Response: Sentence Reworded**

**Should this be skipped if call from *Work Acceptance [PROC016]* Response: Logic Added**

3. Evaluate activities for lowest organizational level or functional employees.

The level-of-effort calculation is based on resource durations in P2. Real life constraints will not allow USACE employees to devote 100% of their effort to one activity on one project at a time. In order to provide better schedules to the project delivery team and other stakeholders, and to provide better workload analyses to Resource Providers, a computation is provided to compute productive time (effective hours) available per FTE.

To see the computation, refer to *Standard and Recommended Computations for Workload Analysis and Resource Leveling[REF1008]*.

A report showing rollups for function and organization workload for month or fiscal year is available **if not just in-house resources, this report should show private-sector contracting % targets. Response: Clarification added in scope** Considering the staff availability and capability, resource providers will determine CFY excess capacity or workload. As a rule, CFY workload will be acceptable if within the upper and lower limits shown in the Quarterly Trigger Values Chart within *Standard and Recommended Computations for Workload Analysis and Resource Leveling[REF1008]*. Eighty percent of the effective hours is the recommended target for annual workload during the first quarter of the CFY, or during the BY or BY+1. Some organizations may have higher or lower

workload targets, but in no case should the annual target workload be more than 100% of effective hours **in CFY Response: Accepted.**

**If workload conflict exists, goto task #4. Otherwise, end of activity.**

4. Work with Project Managers to change activity scope/schedule to resolve their team member's CFY workload conflicts **Note: If this effects a project in Exec Phase check to see if from Change Mgt. Response: logic reviewed and determined correct**

Project managers also includes program managers for Support Services as defined in the ER 5-1-11 in conjunction with the development of Program Management Plans (PgMP).

**If workload conflict remains, goto task #5. Otherwise, end of activity.**

**Corporate Board/PRB Response Modified see master document**

5. Determine if other alternatives are available to resolve conflict.

The DPM **or his designee** is responsible for communicating and documenting the Corporate Board/PRB decisions. **Response: Clarified**

**If workload conflicts are resolved, end of activity. Otherwise, goto task #6.**

**RMB Response: accepted**

6. **Responsible to eResponse: Accepted**ecute P2 Regional Resource Workload Analysis.
7. **Determine**recommendation. **Response: Accepted**

**Response: accepted Response: Accepted**8. Recommend solution to MSC Commander.

Refer to Command Workload Analysis & Resource Leveling[PROC1024].

**Major Subordinate Command (MSC) Commander**

9. Approve RMB recommendation.

**If recommendation approved, end of activity. Otherwise, goto task #6.**

**End of activity.**

